NOTE

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PUBLICATION HAVE BEEN FILMED

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METRO Magazine

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SPECIAL EDITION $25

1985-86 FACT BOOK

Bus & Chassis Manufacturers
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An update of fact and figures on surface mass transportation.

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ABA American Bus Association
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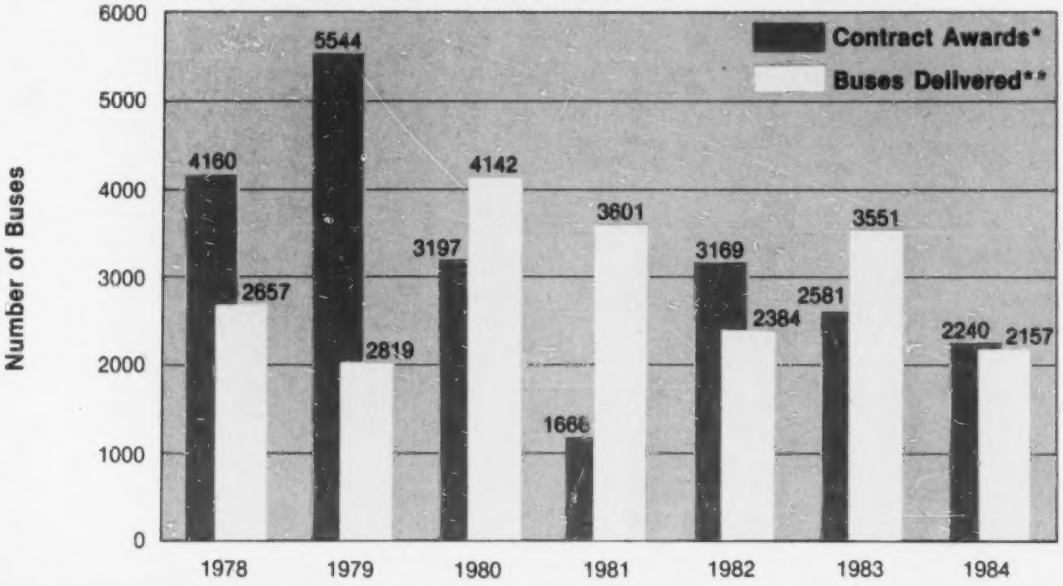
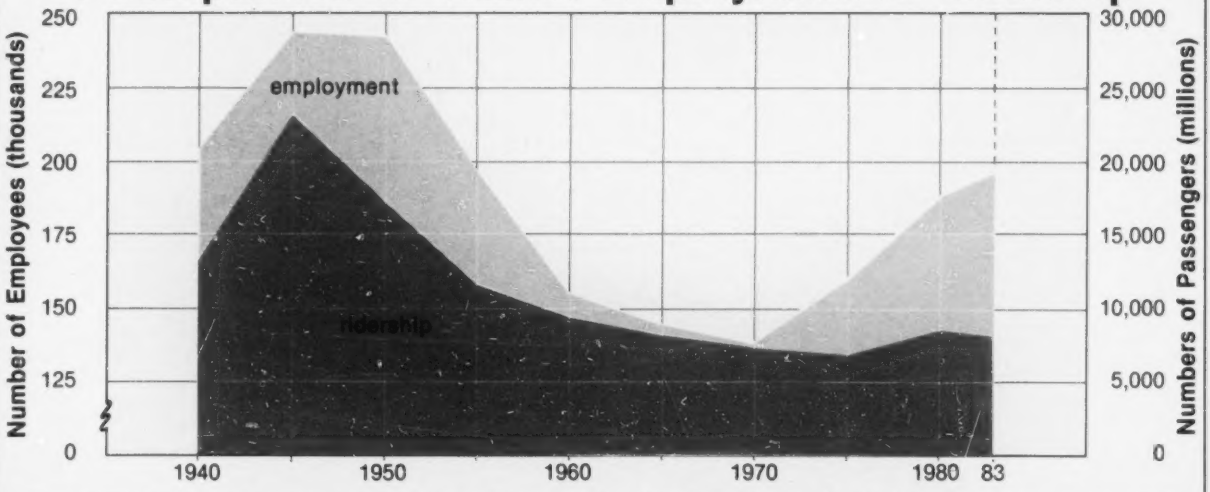
Statistics

Transit Bus Awards vs. Deliveries



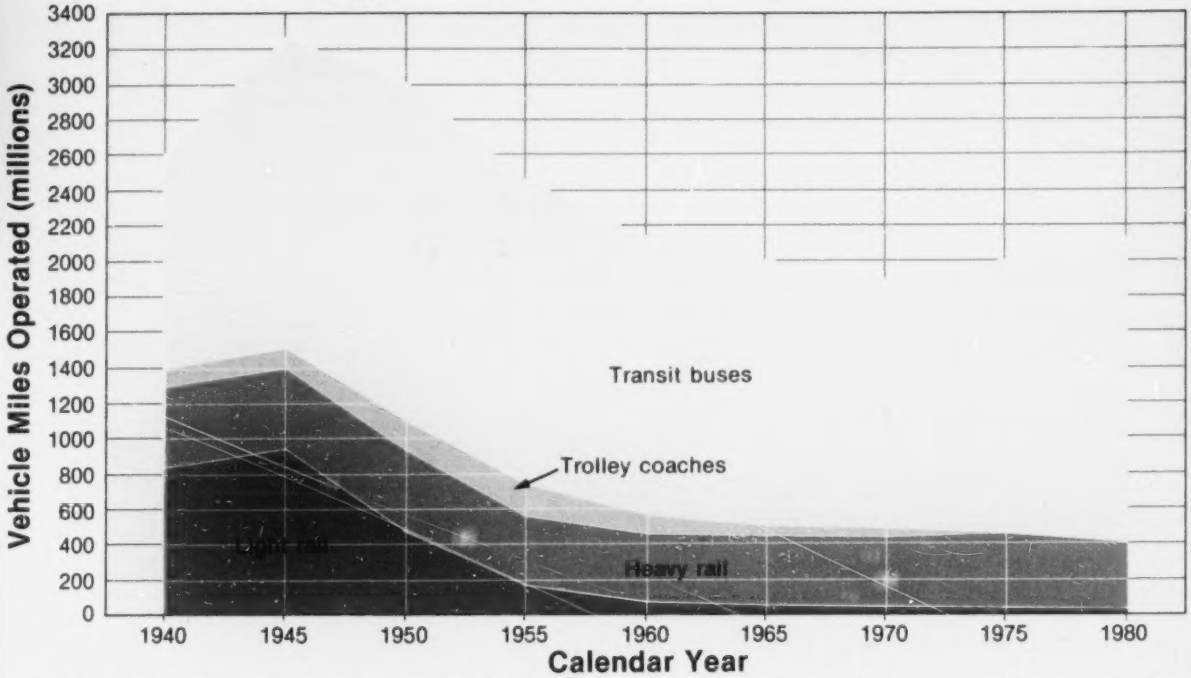
Contract awards are one method to track the economic condition of the transit bus market. However contract awards only reflect what occurs at the operator level; contracts are not an accurate picture of what occurs on the manufacturing level for units manufactured and delivered always lag contracts. This chart compares two sets of data: 1) the number of buses for which contracts were awarded by public transit authorities, and 2) the number of transit buses delivered by bus manufacturers. Data shown only represents standard 40-ft. transit buses; vans and smaller transit vehicles are not included.
Source: *Research by The Flxible Company **APTA 1985 Transit Fact Book

A Comparison of Transit Employment to Ridership



By comparing ridership to employment in the transit industry from 1940 to 1983, a couple of noteworthy patterns are revealed. Although transit ridership (number of passenger trips) closely paralleled transit employment (number of employees) from 1940 to about 1970, not long after the Urban Mass Transportation Act of 1964 took hold, employment quickly began to outpace ridership. Since two apparently unrelated parameters (ridership and employment) are being compared, it can be said that this graph is comparing "apples and oranges." Hence, the results may or may not indicate a decline in productivity levels among transit employees. However, the graph was constructed, and the scales designed, to provide a general "picture" of the two parameters over the last four or five decades. And the picture that emerges is of an industry that is increasingly using a greater number of employees to move about a moderately growing number of transit passengers.
Source: APTA 1895, Fact Book

Sum of Passenger Vehicle Miles Operated by Modes



Since the height of WWII buses have accounted for the bulk of the industry's vehicle miles. In 1983 transit buses provided 79 percent of all passenger vehicle miles operated. According to industry data, motor bus vehicle miles increased a modest .07 percent in 1983 over 1982, but declined 2.5 percent in 1983 compared to 1945.

Source: 1985 Transit Fact Book, APTA

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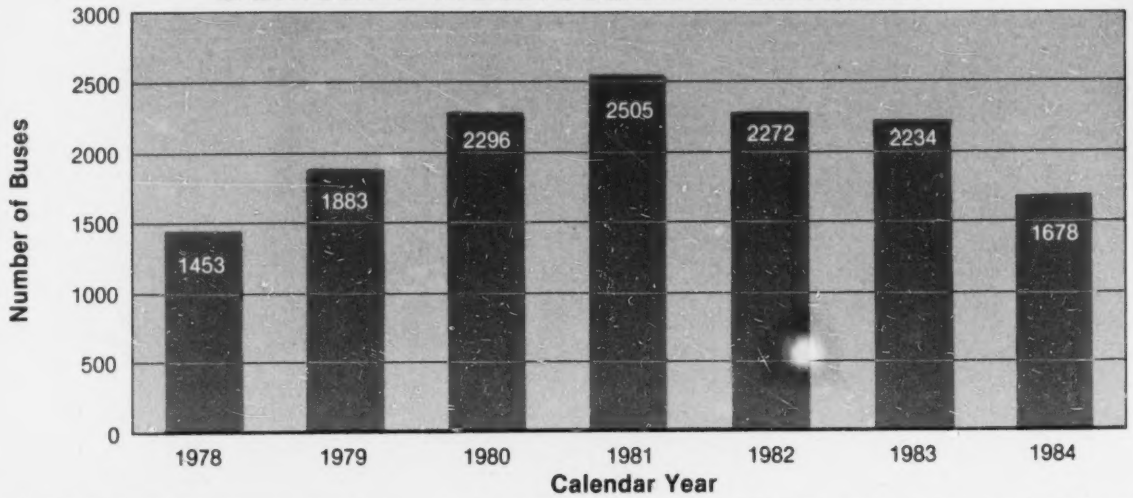
Domestic Motorcoach Production



This data presents the aggregate number of intercity buses manufactured by year for the domestic motorcoach market; an estimated 90 percent of these vehicles were sold into the United States with the remainder going to Canada and a few overseas. This data, through 1982, was supplied by MCI, TMC, Eagle, Prevost and GMC. GMC is not included from 1981 onward as the company manufactured its last intercity motorcoach in 1980.

Data for 1983 and 1984 includes estimates by **METRO Magazine** Research Department as two manufacturers now decline to supply data. More than 5 percent of these buses are sold into the U.S. motorcoach market, with the remainder going to Canada and overseas.

None of the figures include imported buses from Europe or elsewhere. In 1984 less than 150 charter and tour motorcoaches were imported, a figure that was considerably smaller in earlier years but one that will likely grow in the coming year in the aftermath of the Bus Regulatory Reform Act of 1982. The data also does not include the sale of used motorcoaches, a figure industry experts say is about 2,500 units per year.

Source: **METRO Magazine** Research Department.

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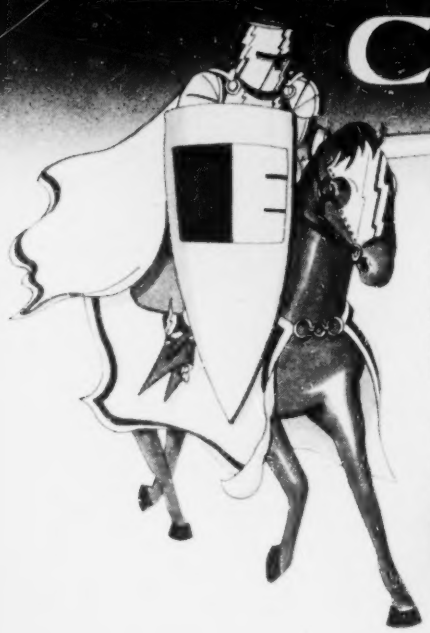

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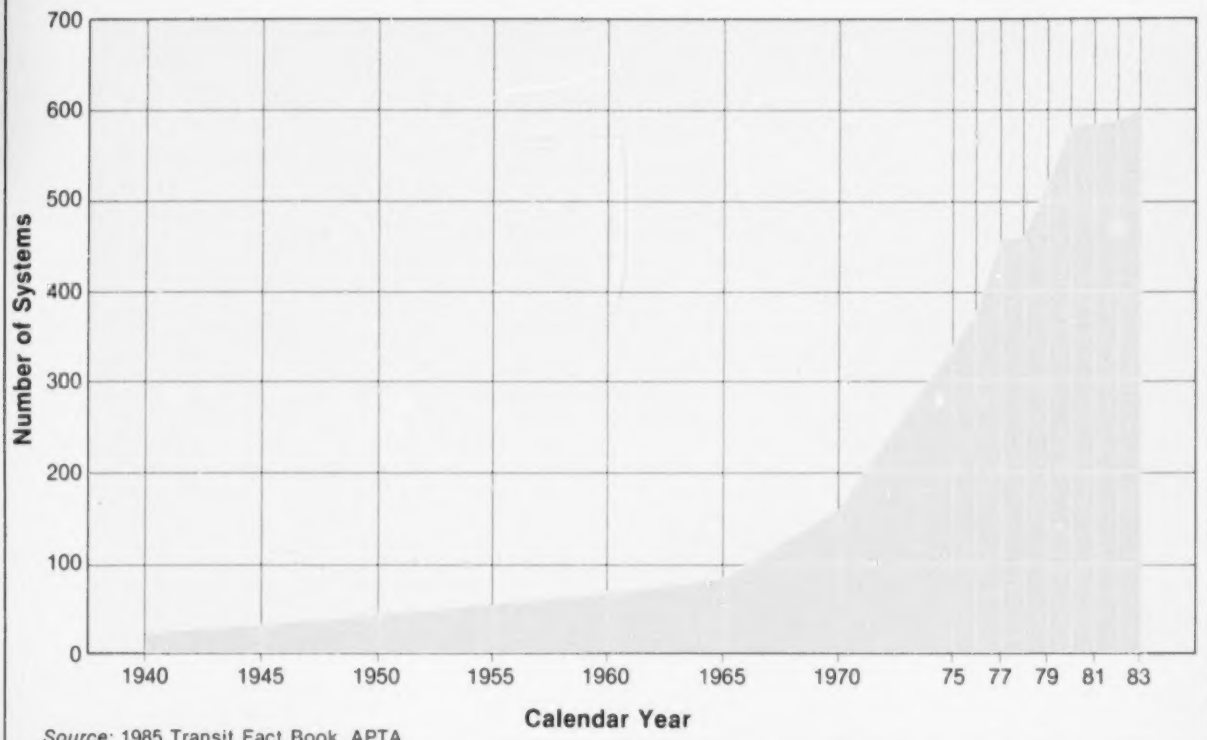
Number of U.S. Publicly Owned Transit Systems



Source: 1985 Transit Fact Book, APTA

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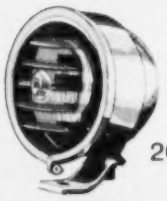
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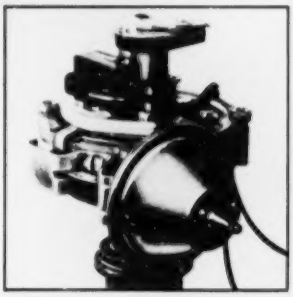

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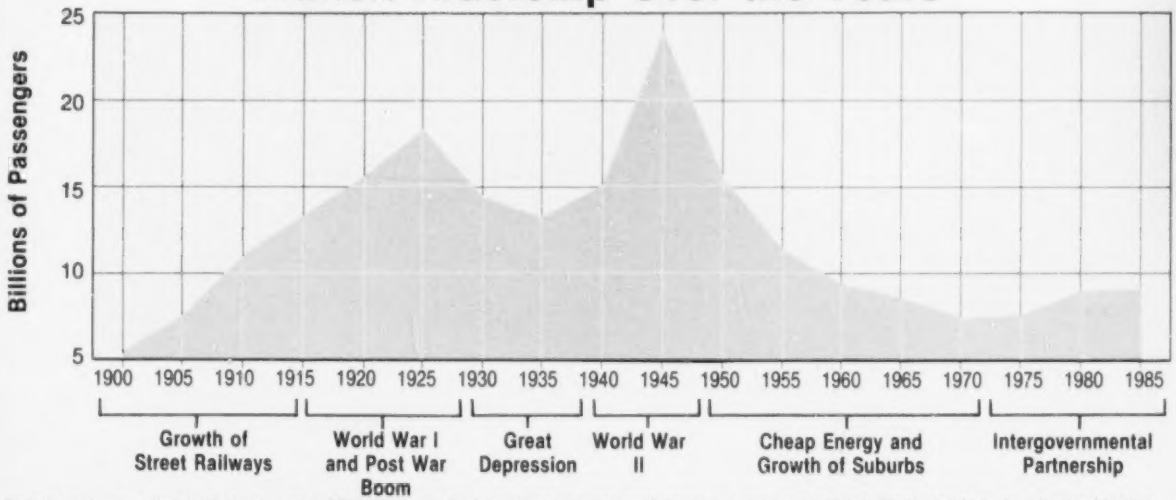
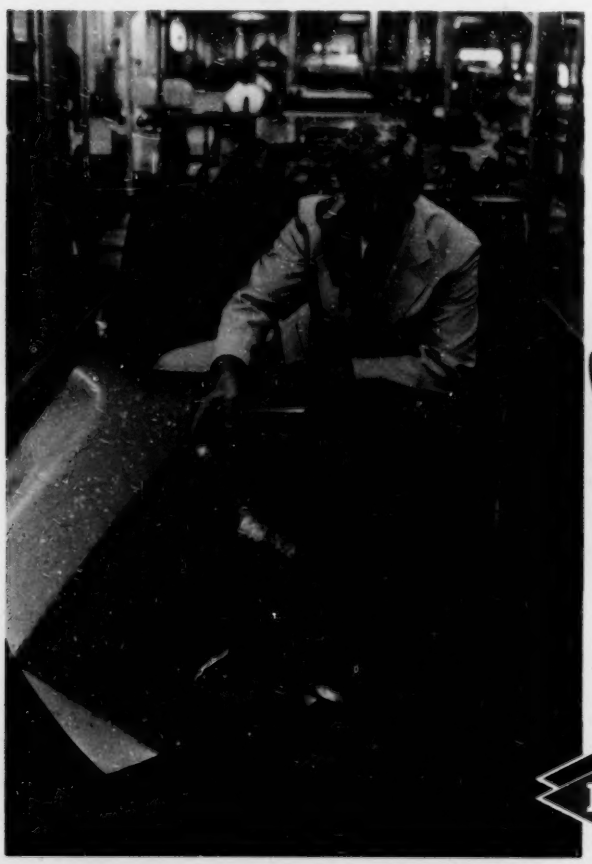
Transit Ridership Over the Years



Public transit ridership during the 20th century has undergone several major cycles of growth and decline, as shown by this line graph. Most of the cycles have been influenced by social and economic forces external to public transit. The first cycle, which occurred from 1900 to 1929, showed transit ridership growing steadily as a result of two factors: 1) technical innovation and investment opportunities during the early development of street railways, and 2) the economic boom of World War I and the post-war period. The Great Depression caused the next cycle, which resulted in a steep decline in ridership between 1929 and 1939, as people made fewer work trips and often could not afford to take pleasure trips. Also during this period, a new federal law limited utilities' ability to subsidize transit, — as had been normal practice — leading to a decline in transit capital facilities. But World War II caused motor fuel rationing and an economic boom, both of which led to a new rapid growth cycle in transit ridership. However, ridership quickly declined from the inflated war levels as people moved out to the suburbs, encouraged by inexpensive fuel, explosive growth in automobile usage, and government policies favoring expansion into the suburbs. Ridership reversed again in about 1973, when transit began a steady growth on cooperative efforts between local, state, and federal governments aimed at improving the U.S. transit infrastructure.

Source: APTA 1985 Transit Fact Book



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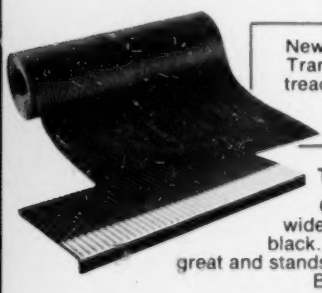

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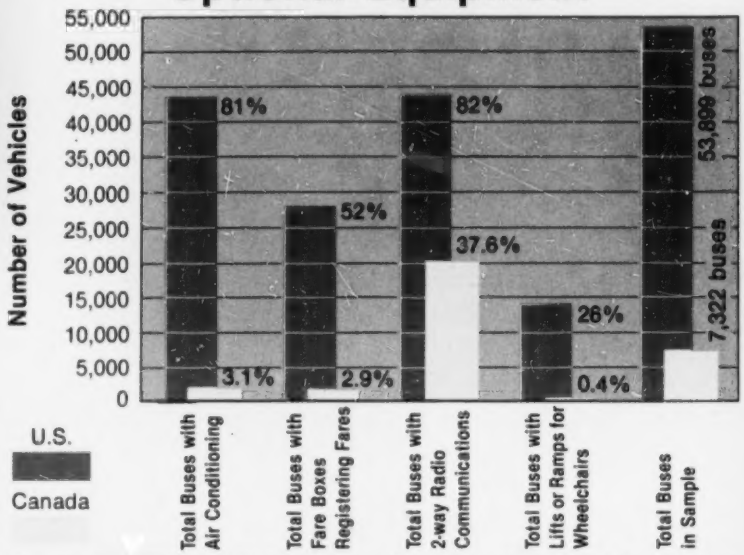
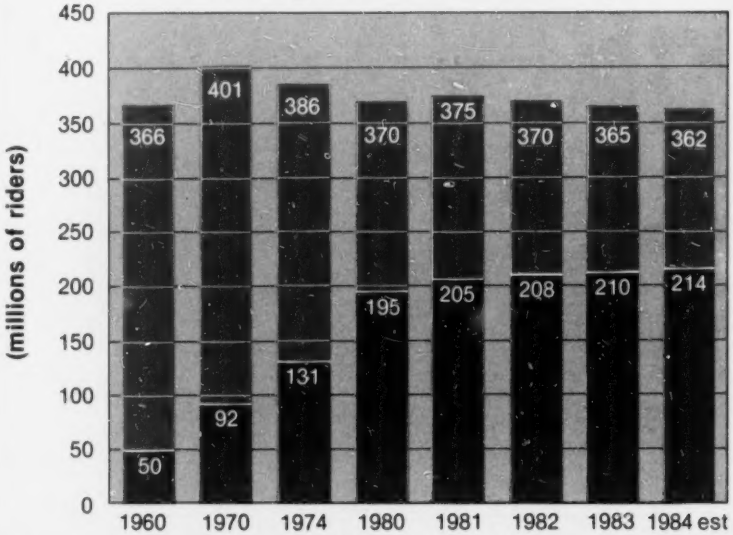
Optional Equipment



A survey by APTA of United States transit systems showed that as of January 1, 1985 there were 53,899 transit buses owned or leased by the 276 properties which reported complete data. These data show that two-way radios are the most common type of optional equipment with air conditioning, electronic fareboxes, and lifts or ramps for wheelchair access, following in that order. When the 13 Canadian transit systems representing 7,322 buses and which reported complete data are included, two-way radios remain at the top of the list with electronic air conditioning, fareboxes and wheelchair lifts following in that order. However a wide disparity exist between U.S. usage of these items versus Canadian usage.

Source: APTA, 1985 Transit Passenger Vehicle Fleet Inventory

Intercity Bus Ridership



The dramtic growth of charter and tour bus ridership over the past two years represents a reorientation of the travel market prompted by passage of the Bus Regulatory Act of 1982. However the new pattern is merely a continuation of ridership trends that can be traced back more than two decades. In 1960 more than 85 percent of all intercity bus passengers traveled in regular route, line haul service while only 14 percent were charter and tour passengers. By the end of 1984 the reverse had become the case with fully 60 percent of all intercity bus passengers traveling in charters and tours while only 40 percent took regular route line haul trips.

Source: **METRO Magazine** Research Dept./ABA

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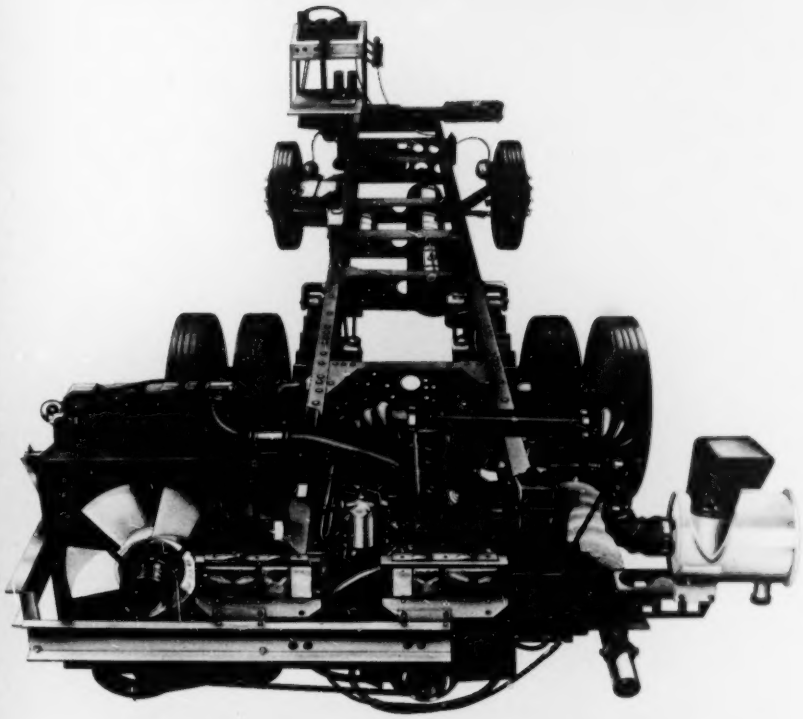

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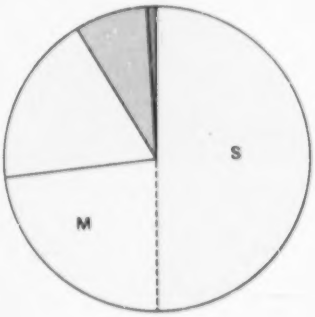
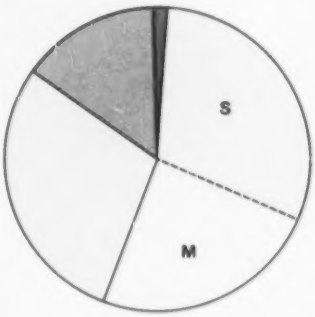
Comparison of Operating Data by Transit Mode for 1983

Each of the circle graphs here compares operating data for the four main modes of modern public transit (plus an additional "other" category representing such modes as taxi operators). The four modes are: single-mode motor bus systems, multi-mode motor bus operations, heavy rail, and commuter railroad. The various transit modes can be compared both to each other and to the entire spectrum of public transit, in four categories of operating data: vehicle miles, active vehicles, passenger miles, and passenger trips. In each circle graph, single-mode motor



VEHICLE MILES

S	Single Mode Motor Bus Systems*	49%
M	Multi-Mode Motor Bus Operations*	24%
	Heavy Rail	18%
	Commuter Railroad	8%
	Other Modes	1%

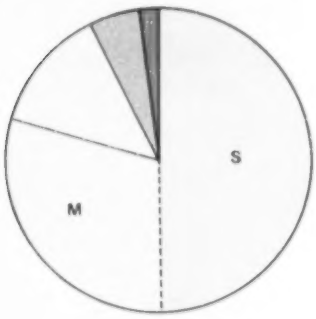


PASSENGER MILES

S	Single Mode Motor Bus Systems*	30%
M	Multi-Mode Motor Bus Operations*	24%
	Heavy Rail	28%
	Commuter Railroad	16%
	Other Modes	2%

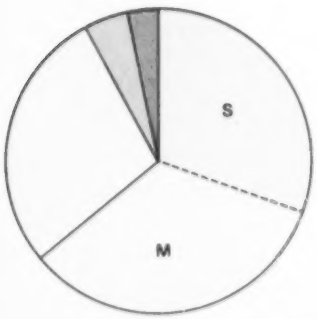
bus and van operations by systems not operating any other type of vehicles; multi-mode motor bus operations include both motor bus and van operations of transit systems also operating marine service, trolley coach service, or a railway mode. The greatest percentage among modes in each category of operating data is accounted for by single-mode motor bus systems. The second greatest percentage among modes in all categories except passenger miles is accounted for by multi-mode motor bus operations. The exception in the passenger miles category is that heavy rail accounts for a greater percentage of all transit operations than do multi-mode bus operations.

Source: APTA Transit Fact Book, 1985.



ACTIVE VEHICLES

S	Single Mode Motor Bus Systems*	51%
M	Multi Mode Motor Bus Operations*	28%
	Heavy Rail	13%
	Commuter Railroad	6%
	Other Modes	2%



PASSENGER TRIPS

S	Single Mode Motor Bus Systems*	31%
M	Multi-Mode Motor Bus Operations*	35%
	Heavy Rail	26%
	Commuter Railroad	3%
	Other Modes	5%

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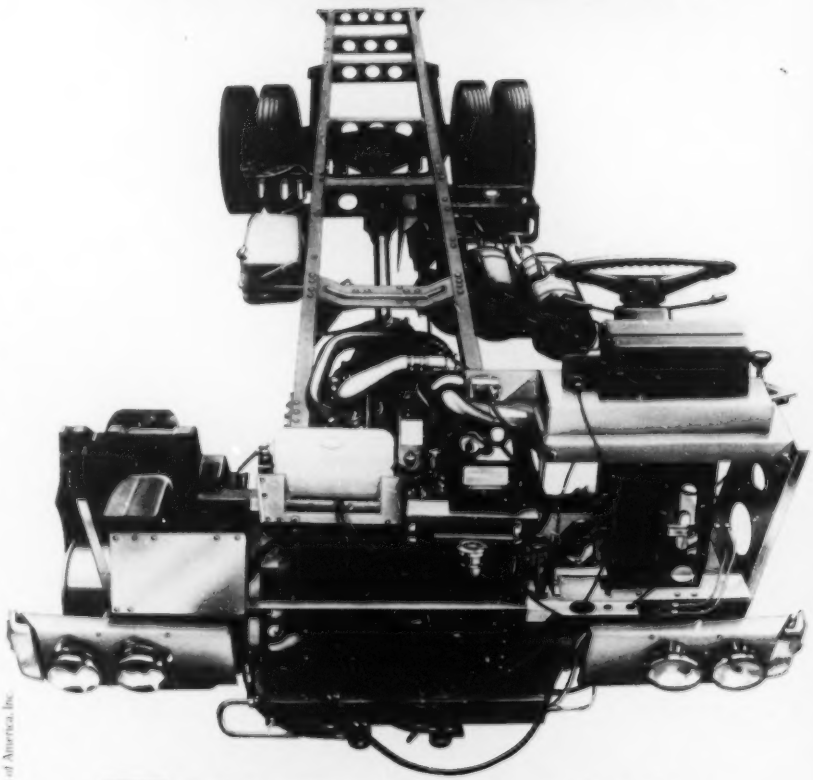

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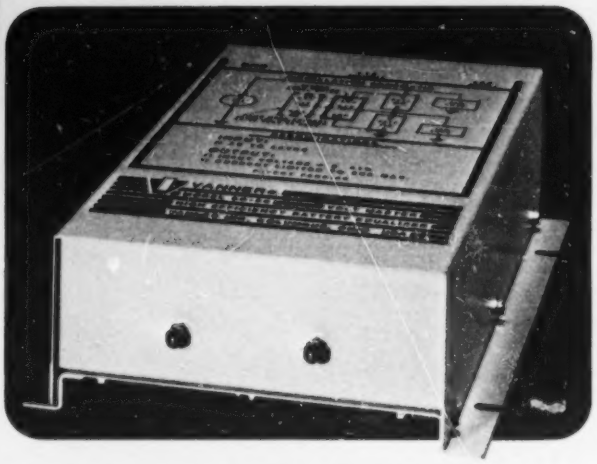

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The Intercity Bus Industry in the United States

	1980	1981	1982	1983	1984	1985
Number of operating companies	1,330	1,470	1,520	2,300	3,247	3,585
Number of buses	21,400	21,500	22,000	23,500	25,000	N/A
Number of employees	49,100	49,200	49,500	50,000	51,000	—
Total bus miles (millions)	1,162	1,134	1,115	1,120	1,098	—
Total revenue passengers (millions)	370	375	370	365	362	—
Charter and tour passengers (millions)	195	205	206	210	214	—
Total revenue passenger miles (millions)	27,400	27,100	26,900	26,500	27,100	—
Operating revenue (millions)	$1,943.0	$2,068.7	$2,103.1	$2,211.3	$2,279.7	—
Operating expenses (millions)	$1,810.9	$1,956.1	$2,044.3	$2,167.1	$2,240.8	—
Net operating revenue (millions)	$132.1	$112.6	$58.8	$44.2	$39.9	—
Operating ratio	93.2	94.6	97.2	98.0	98.3	—

Source: ABA

Intensity of Transit Use Decreases

Year	Total passengers' per vehicle mile	Bus passengers' per vehicle mile	Rail passengers' per vehivle mile
1960	3.51	3.22	4.31
1965	3.39	3.09	4.31
1970	3.15	2.88	3.96
1972	2.96	2.72	3.81
1974	2.94	2.79	3.38
1976	2.79	2.64	3.38
1978	2.94	2.70	3.92
1980	3.08	2.90	3.73
1982 (est.)	2.84	2.65	3.43

'Originating transit passenger trips.

Source: Comptroller General's Report to Congress

Transit's Share of Commuting Market Declines

City	Percent of workers using transit 1970	1980
Boston	19.7	15.6
Chicago	23.3	18.0
Washington, D.C.	16.3	15.5
Atlanta	8.4	7.8
Los Angeles	5.6	7.0

Source: Comptroller General's Report to Congress

Intercity Passenger Miles by Mode of Travel

	Auto mobiles[1]	Motor Coaches[1]	Total Motor Vehicles[1]	Railways, Revenue Passgrs.	Airways, Domestic Revenue Services	Total
Passenger Miles by Mode (In Billions)						
1984 Preliminary	1,465.0	27.1	1,492.1	11.5	260.9	1,764.5
1983	1,392.6	26.5	1,419.1	11.1	244.4	1,674.6
1982	1,344.9	26.9	1,371.5	10.9	226.7	1,609.4
1981	1,319.3	26.8	1,346.1	11.4	216.0	1,573.5
1980	1,300.4	27.4	1,327.8	11.0	219.1	1,557.9
1979	1,322.4	27.7	1,350.1	11.6	228.2	1,589.9
1978	1,362.3	25.6	1,387.9	10.5	203.2	1,600.8
1977	1,316.0	25.7	1,341.7	10.4	177.0	1,529.1
1976	1,259.6	25.1	1,284.7	10.5	164.4	1,459.6
1975	1,170.7	25.4	1,196.1	10.1	148.3	1,354.5
1974	1,121.9	27.7	1,149.6	10.5	146.6	1,306.7
1973	1,162.6	26.4	1,189.2	9.3	143.1	1,341.6
1970	1,026.0	25.3	1,051.3	10.9	118.6	1,180.8
1965	817.7	23.8	841.4	17.6	58.1	917.2
1960	706.1	19.3	725.4	21.6	34.0	781.0
Passenger Miles by Mode (Percent)						
1984 Preliminary	83.0	1.5	84.5	0.7	14.8	100%
1983	83.2	1.6	84.7	0.7	14.6	100%
1982	83.6	1.7	85.2	0.7	14.1	100%
1981	83.8	1.7	85.5	0.7	13.7	100%
1980	83.5	1.8	85.2	0.7	14.1	100%
1979	83.2	1.7	84.9	0.7	14.4	100%
1978	85.1	1.6	86.7	0.7	12.8	100%
1977	86.1	1.7	87.8	0.7	11.5	100%
1976	86.3	1.7	88.0	0.7	11.3	100%
1975	86.5	1.9	88.4	0.7	10.9	100%
1974	85.8	2.1	87.9	0.8	11.3	100%
1973	86.7	2.0	88.7	0.7	10.6	100%
1970	86.9	2.1	89.0	0.9	10.1	100%
1965	89.2	2.6	91.8	1.9	6.4	100%
1960	90.4	2.5	92.9	2.8	4.4	100%

(1) Includes intra-city portions of intercity trips. Omits rural to rural trips, and intra-city trips with both origin and destination confined to same city for local bus or transit movements, non-revenue school and government bus operations.
Source: Interstate Commerce Commission and Transportation Policy Associates, *Transportation in America*

Transit Industry Equipment

Calendar Year	Light Rail Car	Heavy Rail Car	Trolley Coach	Transit Bus	Total Vehicles
1983	1,013	9,943	686	62,093	73,782
1982	1,016	9,867	763	62,114	73,803
1981	1,075	9,801	751	60,393	72,063
1980	1,013	9,693	823	59,411	70,983
1979	959	9,522	725	54,490	65,739
1978	944	9,567	593	52,866	64,013
1977	992	9,939	645	51,968	63,287
1976	963	9,714	686	52,382	63,787
1975	1,061	9,608	703	50,811	62,226
1970	1,262	9,608	1,050	49,700	61,350
1965	1,549	9,115	1,453	49,600	61,717
1960	2,856	9,010	3,826	49,800	65,292
1955	5,300	9,232	6,157	52,400	73,089
1950	13,228	9,758	6,504	56,820	86,310
1945	26,160	10,217	3,711	49,670	89,758
1940	26,630	11,032	2,802	35,000	75,464

(note: Data includes vans owned or leased by transit systems beginning in 1975, but excludes commuter railcars.)

Source: 1985 Transit Fact Book

The total number of transit vehicles bottomed out in the years immediately following passage of the Urban Mass Transportation Act of 1964. Since then the number of passenger vehicles in the industry has increased steadily with buses accounting for the greatest growth.

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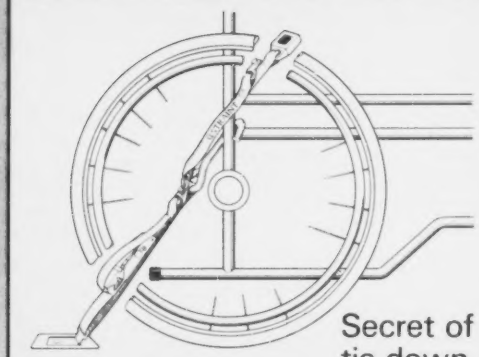

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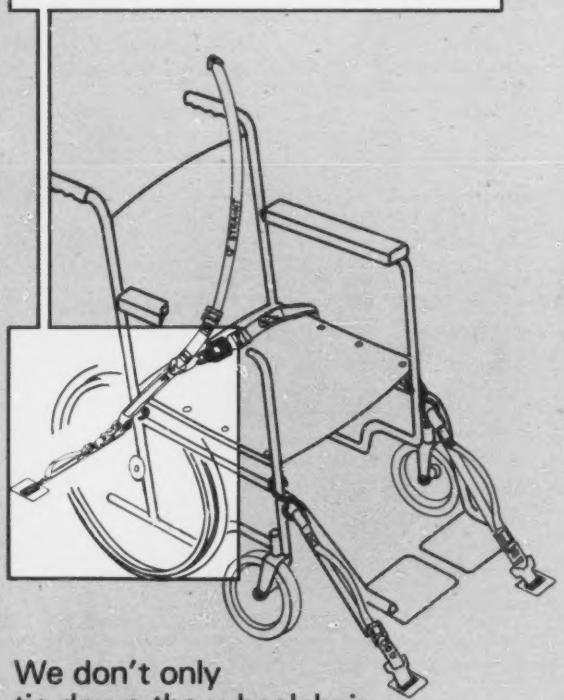

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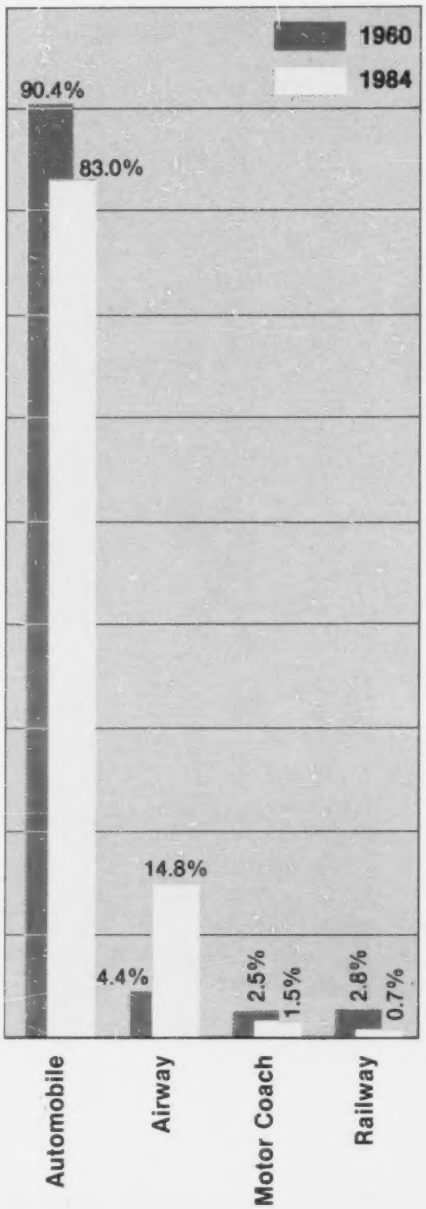
Percent of Intercity Passenger Miles by Mode of Travel



The automobile remains the favored mode of intercity travel, though in the past quarter century airline travel has increased more than 300 percent. Still, Americans travel five times further by automobile in intercity travel than all other modes combined. In 1984 automobile travel accounted for an estimated 1.5 trillion passenger miles, airlines 261 billion passenger miles, motorcoaches (excluding urban transit) 27 billion passenger miles, and railroads (excluding urban transit) 11.5 billion passenger miles. All modes of intercity passenger travel for 1984 amounted to an estimated 1.76 trillion passenger miles, an increase of 5.4 percent from the year before. In 1980, the base year of this chart, all modes of intercity travel amounted to an estimated 781 billion passenger miles.

Source: MVMA Motor Vehicle Facts & Figures '85

Circle 116 on METRO Action Card